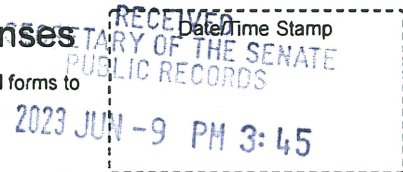


RE-2 Employee Post Travel Disclosure of Travel Expenses

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building. This form is a public disclosure. The form and all attachments will be made publicly available.



Certification: In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:

Private Sponsor(s):

Senate Working Group

Travel Dates:

April 27 - 29, 2023

Name of accompanying family member (if any):**Relationship to Traveler:**

N/A

Total Expenses**Transportation Expenses**

\$330.12

Lodging Expenses

\$192.00

Meals Expenses

\$93.00

Other Expenses (Amount & Description)

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final **Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

6/9/23
DateBRAD GRANTZ
Printed Name of Traveler
Signature of Traveler**TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER**

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

6/9/23

Date

Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☐ Yes ☒ No

Expense Change

Revised Amount

Explanation

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation:

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

Explanation:

RE-1 Employee Pre-Travel Authorization

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved.

Date/Time Stamp

Name of Traveler:

Brad Grantz

Employing Office/Committee:

Senate Commerce Committee

Private Sponsor(s):

Senate Working Group

Destination(s):

White Sulphur Springs, WV 24986

Travel Dates:

4/27/23 - 4/29/23

NOTE: If you plan to extend the trip for any reason you **must** notify the Committee.

Explain how this trip is specifically connected to the traveler's official or representational duties.

As Staff Director of the Commerce Committee, this trip will help further my knowledge of relevant policies and skills for running the committee.

Do you have an accompanying family member or spouse on this trip? Name and Relationship to Traveler:

☐

(signify "yes" by checking box)

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

4/11/2023

Date

Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)

Ted Cruz

Brad Grantz

(Print Senator's/Officer's Name)

hereby authorize

(Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.

☒

(signify "yes" by checking box)

4/11/2023

Date

Signature of Supervising Senator/Officer

CHRISTOPHER A. COONS, DELAWARE, CHAIRMAN
JAMES LANKFORD, OKLAHOMA, VICE CHAIRMAN

BRIAN SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE

JAMES E. RISCH, IDAHO
DEB FISCHER, NEBRASKA

SHANNON HAMILTON KOPPLIN, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM B. CABLE, CHIEF CLERK

HART SENATE OFFICE BUILDING, ROOM 220
SECOND AND CONSTITUTION AVENUE, NE
WASHINGTON, DC 20510-6425

TELEPHONE: (202) 224-2981
FACSIMILE: (202) 224-7416
TDD: (202) 228-3752

United States Senate

SELECT COMMITTEE ON ETHICS

April 20, 2023

Brad Grantz
Committee on Commerce, Science, and Transportation
United States Senate
Washington, DC 20510

Dear Mr. Grantz:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you received to travel to the *2023 Senate Republican Chiefs of Staff & Committee Staff Director's Summit* in White Sulphur Springs, West Virginia, on April 27–29, 2023, sponsored by Senate Working Group. Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from Senate Working Group in connection with this trip.

Background

Based on your communication with the Committee, the background in this matter is as follows.¹ You are employed as Republican Staff Director of the Committee on Commerce, Science, and Transportation, and Senator Ted Cruz is your supervising Senator. Senate Working Group invited you to travel to *2023 Senate Republican Chiefs of Staff & Committee Staff Director's Summit* in White Sulphur Springs, West Virginia, on April 27–29, 2023. Senate Working Group certified to the Committee that it will pay the necessary expenses² related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. Senate Working Group has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.³

Discussion

Privately sponsored travel includes any gift of travel and travel-related expenses for travel outside the Senate duty station, including transportation, lodging, food and refreshments, and conference fees and materials, whether paid for directly, reimbursed, or provided directly, from a private individual or entity, in connection with a Member's, officer's, or employee's

¹ If this letter does not correctly recite the facts, contact the Committee immediately.

² The term "necessary expenses" has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel – Glossary of Terms* at 8.

³ The term "any point throughout your trip" has a specific definition. See *id.* at 2.

official Senate duties. Incorporating reforms from the Honest Leadership and Open Government Act of 2007 (HLOGA), Pub. L. 110-81 (2007), Senate Rule 35.2 permits Members, officers, and employees to accept privately sponsored travel only with the prior written approval of the Committee.

The Committee's approval process is governed by the *Regulations and Guidelines for Privately Sponsored Travel and Glossary of Terms* (collectively, *Travel Regulations*). The *Travel Regulations* contain detailed requirements regarding who may sponsor travel; time limits for trips; and the type and amount of expenses that can be reimbursed.

Entities that do not retain or employ a lobbyist or foreign agent and all non-profit organizations designated as tax-exempt organizations under § 501(c)(3) of the Internal Revenue Code of 1986, regardless of whether they retain or employ a lobbyist or foreign agent, may sponsor domestic trips for up to three days. The three-day limitation means three 24-hour periods, calculated from the time of arrival in the trip location to the time of departure from the trip location. For such trips, neither lobbyists nor foreign agents may accompany a Senate invitee at any point throughout the trip, other than in a *de minimis* way.⁴ This means that neither lobbyists nor foreign agents may accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited.⁵

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel Certification Form*, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately Sponsored Travel.**

Consistent with these standards and Committee precedent, and Senate Working Group's factual representations, it appears that it is permissible for you to accept necessary expenses from Senate Working Group in connection with this trip, provided that the actual travel and travel-related expenses conform to the information and materials you provided, and the travel and all required documents are disclosed to the Secretary of the Senate (Office of Public Records).

Finally, Senate Rule 34 requires a reporting individual⁶ on their financial disclosure report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$480 from that sponsor during a calendar year. However, if a Member,

⁴ The term "*de minimis*" has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel – Glossary of Terms* at 3.

⁵ See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 5; see also *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel – Glossary of Terms* at 2-3.

⁶ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$141,022 for CY 2023) or is a political fund designee and is required to file financial disclosure reports.

officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their financial disclosure report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,

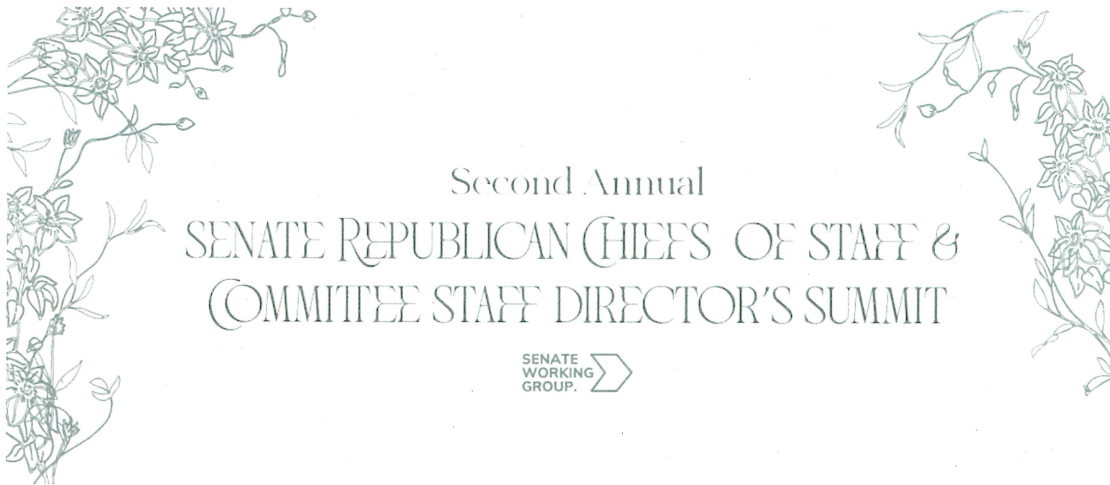


Shannon Hamilton Kopplin
Chief Counsel and Staff Director

Enclosure: Travel Checklist

From: Senate Working Group rsvp@senateworkinggroup.org
Subject: Invitation: 2023 Senate GOP Chiefs & Staff Director's Summit
Date: February 23, 2023 at 9:47 AM

[View this email in your browser](#)



**2023 Senate Republican Chiefs of Staff &
Committee Staff Director's Summit**

On behalf of Senate Working Group, we would like to cordially invite you and your spouse (or guest) to the *Senate Republican Chiefs of Staff & Committee Staff Director's Summit*. The event will be held **April 27 - 29, 2023 at The Greenbrier Resort in White Sulphur Springs, West Virginia.**

The *Summit* is the largest concentration of Republican Senate Chiefs of Staff and Committee Staff Directors outside of Washington, D.C. Bringing together our country's leaders, policy experts, and thought leaders beyond the confines of our nation's capital, this *Summit* serves to provide an educational deep dive into the issues affecting our country. In addition to the Chiefs of Staff, Staff Directors, and their guests, Senate Working Group members will also attend portions of the event.

Senate Working Group is a registered 501(c)(4) nonprofit organization dedicated to providing educational resources to Senate Staff. Founded in 2021, Senate Working Group hosts numerous educational trainings, workshops, and networking events throughout the year, including its signature *Chief's Summit*. Senate Working Group does not employ or hire lobbyists and is funded solely by private and corporate donations.

Step 1: Register for the event!

Senate Working Group will coordinate all logistical arrangements for the *Summit*, including room reservations, meals, mileage reimbursement, meetings, and other activities during the event. Senate Working Group will happily cover the cost of participation for each invitee and their spouse (or guest). You are welcome to bring your children, though you will be responsible for the cost of their participation. All reservations must be made through Senate Working Group.

To register, please click the below link and add the corresponding access code when prompted. Once you answer each question within the registration process, you will be sent a confirmation email with additional details, including a calendar invite.

Registration link: <https://www.senateworkinggroup.org/2023-swg-summit>

Access Code: 2023summit

Step 2: Submit Ethics Packet by Friday, March 24, 2023!

To comply with Ethics' rules, you will need pre-authorization from the Select Committee on Ethics. By following "Step 1" and registering for the event, you will be sent Senate Working Group's **Private Sponsor Travel Certification Form**. Once you receive the form, please submit it along with your completed [Employee Pre-Travel Authorization](#) form **by Friday, Friday, March 24, 2023**.

Failure to submit your form 30 days prior to the event means we will be unable to cover the cost of your attendance and you would need to cover the cost personally.

Additionally, you must file your [Employee Post-Travel Disclosure of Travel Expenses](#) with the Office of Public Records within 30 days of your return – **submit by May 29, 2023**.

Finally, we understand your attendance is pending Ethics' approval. More information on the retreat will be sent to you in the weeks leading up to the event. If you have any questions, concerns, or need additional information, please contact me directly at (858) 336-0293 or james@senateworkinggroup.org.

Thank you for your consideration and I look forward to hearing from you!

Sincerely,

James





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This is the Senate Working Group

Our mailing address is:
Senate Working Group
1100 New Jersey Ave SE
Ste 2275
Washington, DC 20003-3302

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You can [update your preferences](#) or [unsubscribe](#)

Trip Name: Senate Republican Chiefs of Staff & Committee Staff Director's Summit**Organization Information****Organization Name:**

Senate Working Group

Is your organization classified as a §501(c)(3)?☐ Yes☒ No**If Yes, §501(c)(3) Organization Type:**☐

Private Foundation

☐

Public Charity

Address:

1100 New Jersey Ave SE Suite 2275

City, State, Zip:

Washington, DC 20003

Phone Number:

(858) 336- 0293

Organization URL:<https://www.senateworkinggroup.org>**History of Congressional Travel**

Describe your organization's history of sponsoring congressional travel.

Senate Working Group is a newer organization, created on October 8, 2021. In addition to hosting events in Washington, D.C., Senate Working Group hosted the 2022 Senate Republican Chiefs of Staff and Committee Staff Director's Symposium at the Greenbrier Resort on March 24-26, 2022 along with the Senate Republican Banking Committee Staff Summit in New York, New York on September 29-30, 2022.

Educational Activities

Describe the educational activities performed by your organization other than sponsoring congressional travel.

Senate Working Group provides educational trainings, as well as hosts widely attended events throughout the calendar year. These trainings and events are offered to all Senate staff, from Chiefs of Staff or Senate Interns.

Lobbyist and Foreign Agent Registration Information**Lobbyist Registration Status (Select one):**☒

I certify that the sponsor is not a federally registered lobbyist and does not retain or employ a federally registered lobbyist.

☐

I certify that the sponsor is not a federally registered lobbyist but does retain or employ one or more federally registered lobbyists.

Foreign Agent Registration Status (Select one):☒

I certify that the sponsor is not an agent of a foreign principal and does not retain or employ an agent of a foreign principal.

☐

I certify that the sponsor is not an agent of a foreign principal but does retain or employ one or more agents of a foreign principal.

Foreign Government Involvement**Foreign Agent Registration Status (Must select all):**☒

I certify that the sponsor is not a foreign government.

☒

I certify that the sponsor is not an entity that is owned or operated by a foreign government.

☒

I certify that the sponsor does not receive funding from a foreign government.

Purpose and Details

Provide a brief description of the trip.

This year's Senate Republican Chiefs of Staff & Committee Staff Director's Summit will be held April 27-29, 2023 at the Greenbrier Resort in White Sulphur Springs, WV. This year's Summit will focus on a 'brighter future: how Washington can better serve the American people.' Taking an educational deep dive examination into the issues affecting everyday Americans, the three day event will be filled with presentations and panel discussions with policy experts and thought leaders on topics such as the economy, inflation, national security, government accountability, and immigration.

Explain how the purpose of the trip relates to your organization's mission.

Senate Working Group is a 501(c)(4) nonprofit organization dedicated to providing educational resources to Senate staff. In addition to local trainings and receptions throughout the year, the 2023 Chief-of-Staff and Committee Staff Director's Summit provides us the ability to connect Senate staff with policy experts and thought leaders in an intimate, off-the-record setting.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

If No, describe your organization's role in planning the trip.

If there are multiple sponsors, each sponsor must submit Organization Information (Page 1 of the Private Sponsor Travel Certification Form) and a Signature Page Form.

Grantmaking Organizations (Optional)

If you have a Grantmaking Organization, you must attach a Grantmaking Organization Certification Form.

- 1.
- 2.
- 3.

With or Without Regard to Congressional Participation (Select one):

- ☐ The trip is arranged or organized without regard to congressional participation.
- ☒ The trip is arranged or organized with regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing (Must select all):

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations (Select one):

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Complete if any of the sponsors is not a §501(c)(3) organizations (Select one):

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Certification of No Recreational Activity and No Alcohol (Must select all):

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Will members and staff from the House of Representatives receive invitations?

- ☐ Yes ☒ No

Travel Details (Submit additional pages as needed)

Trip Start Date/Time:

04/27/2023 @ 07:00 PM



Trip End Date/Time:

04/29/2023 @ 11:00 AM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☒ Yes☐ No

Transportation (Member/Officer/Employee: \$330.12 Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Ground Transportation	N/A	\$330.12

Details (optional)

Mileage reimbursement calculated by the 2023 IRS standard mileage rate of \$0.655 per mile.

Lodging (Member/Officer/Employee: \$192.00 Accompanying Family Member: \$0.00)

Check-In	Check-Out	Facility	City	State	Country
4/27/2023	4/29/2023	The Greenbrier Resort	White Sulphur Springs WV		USA
Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.		
2	\$96.00	No			
Check-In	Check-Out	Facility	City	State	Country
Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.		
Check-In	Check-Out	Facility	City	State	Country
Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.		

Meals (Member/Officer/Employee: \$93.00 Accompanying Family Member: \$93.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
4/27/2023	\$0.00	\$0.00	\$26.00	\$0.00	\$26.00	White Sulphur Spring	WV	USA	No
4/28/2023	\$13.00	\$15.00	\$26.00	\$0.00	\$54.00	White Sulphur Spring	WV	USA	No
4/29/2023	\$13.00	\$0.00	\$0.00	\$0.00	\$13.00	White Sulphur Spring	WV	USA	No
4/27/2023	\$0.00	\$0.00	\$26.00	\$0.00	\$26.00	White Sulphur Spring	WV	USA	No
4/28/2023	\$13.00	\$15.00	\$26.00	\$0.00	\$54.00	White Sulphur Spring	WV	USA	No
4/29/2023	\$13.00	\$0.00	\$0.00	\$0.00	\$13.00	White Sulphur Spring	WV	USA	No

If costs exceed the federal per diem, please explain why expenses over the per diem rate are reasonable and necessary.

Reasonable Miscellaneous Expenses

(Member/Officer/Employee: \$0.00 Accompanying Family Member: \$0.00)

Expense Type	Amount	Notes

Additional Details (optional)

PRIVATELY SPONSORED TRAVEL

SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: Senate Republican Chiefs of Staff & Committee Staff Director's Summit
Travel Date(s): April 27 - 29, 2023
Travel Destination(s): The Greenbrier Resort, 101 Main St W, White Sulphur Springs, WV 24986
Sponsor: Senate Working Group

James Kimmey

Executive Director

(printed name of sponsor representative)

(title)



(signature of sponsor representative)

03/24/2023

(date)

Senate Working Group
2023 Senate Republican Chiefs of Staff & Committee Staff Director's Summit
April 27-29, 2023

Thursday, April 27, 2023

Opening Dinner Plenary

7:00 PM - 9:00 PM

Cameo Ballroom

Whether it's the economy or inflation, foreign policy, immigration, or government accountability, the group will hear from Governor Jim Justice of West Virginia and former Speaker of the House Newt Gingrich as they kick off the start to the Summit and share their thoughts on the current state of affairs and ways we can achieve a brighter future for the American people.

The Honorable **Jim Justice**, Governor, West Virginia

The Honorable **Newt Gingrich**, 50th Speaker of the United States House of Representatives

Friday, April 28, 2023

Breakfast Plenary

9:00 AM - 11:30 AM

Crystal Ballroom

Broken into two separate panel discussions, the group will hear from policy experts from various prominent think-tanks discussing government accountability and foreign policy, specifically the U.S. – China relationship. The first panel will be 60 minutes (30-minute discussion + 30-minute Q&A). The second panel will be 90 minutes (45-minute discussion + 45-minute Q&A).

Government Accountability

Matt Weidinger, Senior Fellow and Rowe Scholar, American Enterprise Institute

Kurt Couchman, Senior Fellow, Fiscal Policy, Americans for Prosperity

Mike Howell, Director, Oversight Project, The Heritage Foundation

Moderator: **Jennifer Heins**, Chief of Staff, Senator Chuck Grassley (R-IA)

Foreign Policy & China

Klon Kitchen, Nonresident Senior Fellow, American Enterprise Institute

Dr. Miles Yu, Director, China Center at the Hudson Institute & former China Advisor to U.S. Secretary of State Mike Pompeo

Morgan Ortagus, Founder of Polaris National Security & former Spokesperson for the U.S. Department of State

Moderator: **Matt Miltenberger**, Chief of Staff, Senator Pete Ricketts (R-NE)

Lunch Plenary
12:30 PM - 2:00 PM
Chesapeake Ballroom

As newer Chiefs to the Senate with recently elected Senators, the purpose of this discussion is to share their experience transitioning into the role, sharing the differences between this role and their previous roles (i.e., House Chief of Staff, Legislative Director, or within the private sector), and the challenges or opportunities they see in the Senate, given their fresh perspective.

Clay Armentrout, Chief of Staff, Senator Katie Britt (R-AL)

Benjamin Cantrell, Chief of Staff, Senator Mark Wayne Mullin (R-OK)

Tucker Knott, Chief of Staff, Senator Ted Budd (R-NC) (invited)

Jimmy Peacock, Chief of Staff, Senator Eric Schmitt (R-MO)

Moderator: **Brent Robertson**, Chief of Staff, Senator Roger Marshall (R-KS)

Afternoon Session
3:30 PM - 5:00 PM
Crystal Ballroom

A deep dive discussion into the issues and how they are being received at home. Featuring national pollster, Ryan Munce of co/efficient. He will share his findings and showcase the trends amongst Americans. He will not discuss elections or campaign related content but will do a national deep dive into the issues that are important to Americans and how those issues may have changed or will continue to change.

Ryan Munce, co/efficient

Dinner Plenary
7:00 PM - 9:00 PM
Chesapeake Ballroom

The dinner will feature a keynote lecture and conversation with former Secretary of State Mike Pompeo, who will discuss America's role in the world along with the growing threat from China. This session will begin with a 30-minute networking reception, followed by a 90-minute discussion and Q&A with Secretary Pompeo.

The Honorable **Mike Pompeo**, 70th United States Secretary of State

Saturday, April 29, 2023**Breakfast Plenary****9:00 AM - 11:00 AM***Crystal Ballroom*

Broken into two separate panel discussions, the group will hear from policy experts from various prominent think-tanks discussing the economy and inflation and a second panel on immigration & border security. Each panel will be broken down into 60-minute segments, giving each panel 45 minutes to introduce and discuss the issue, then will leave 15 or more minutes to take questions from the audience.

Economy/ Inflation

Dr. Michael Strain, Director of Economic Policy Studies & Arthur F. Burns Scholar in Political Economy, American Enterprise Institute

Marc Marie, Regulatory Policy Fellow, Americans for Prosperity

EJ Antoni, Research Fellow, Regional Economics, Center for Data Analysis, The Heritage Foundation

The Honorable **Dr. Michael Faulkender**, Chief Economist, America First Policy Institute & former Assistant Secretary for Economic Policy at the U.S. Department of the Treasury

Moderator: **Allyson Bell**, Chief of Staff, Senator Mike Lee (R-UT)

Immigration & Border Security

Director **Thomas Homan**, former Acting Director of the U.S. Immigration and Customs Enforcement & Visiting Fellow, Border Security and Immigration Center, The Heritage Foundation

The Honorable **Chad Wolf**, former Acting U.S. Secretary of Homeland Security, Executive Director, America First Policy Institute & Chair, Center for Homeland Security & Immigration, America First Policy Institute

Moderator: **Sean Riley**, Chief of Staff, Senator Ron Johnson (R-WI)

Summit Concludes

Senate Working Group
2023 Senate Republican Chiefs of Staff & Committee Staff Director's Summit
April 27-29, 2023

Thursday, April 27, 2023

Opening Dinner Plenary

7:00 PM - 9:00 PM

Cameo Ballroom

Whether it's the economy or inflation, foreign policy, immigration, or government accountability, the group will hear from Governor Jim Justice of West Virginia and former Speaker of the House Newt Gingrich as they kick off the start to the Summit and share their thoughts on the current state of affairs and ways we can achieve a brighter future for the American people.

The Honorable **Jim Justice**, Governor, West Virginia

The Honorable **Newt Gingrich**, 50th Speaker of the United States House of Representatives

Friday, April 28, 2023

Breakfast Plenary

9:00 AM - 11:30 AM

Crystal Ballroom

Broken into two separate panel discussions, the group will hear from policy experts from various prominent think-tanks discussing government accountability and foreign policy, specifically the U.S. – China relationship. The first panel will be 60 minutes (30-minute discussion + 30-minute Q&A). The second panel will be 90 minutes (45-minute discussion + 45-minute Q&A).

Government Accountability

Matt Weidinger, Senior Fellow and Rowe Scholar, American Enterprise Institute

Kurt Couchman, Senior Fellow, Fiscal Policy, Americans for Prosperity

Mike Howell, Director, Oversight Project, The Heritage Foundation

Moderator: **Jennifer Heins**, Chief of Staff, Senator Chuck Grassley (R-IA)

Foreign Policy & China

Klon Kitchen, Nonresident Senior Fellow, American Enterprise Institute

Dr. Miles Yu, Director, China Center at the Hudson Institute & former China Advisor to U.S. Secretary of State Mike Pompeo

Morgan Ortagus, Founder of Polaris National Security & former Spokesperson for the U.S. Department of State

Moderator: **Matt Miltenberger**, Chief of Staff, Senator Pete Ricketts (R-NE)

Lunch Plenary
12:30 PM - 2:00 PM
Chesapeake Ballroom

As newer Chiefs to the Senate with recently elected Senators, the purpose of this discussion is to share their experience transitioning into the role, sharing the differences between this role and their previous roles (i.e., House Chief of Staff, Legislative Director, or within the private sector), and the challenges or opportunities they see in the Senate, given their fresh perspective.

Clay Armentrout, Chief of Staff, Senator Katie Britt (R-AL)

Benjamin Cantrell, Chief of Staff, Senator Mark Wayne Mullin (R-OK)

Tucker Knott, Chief of Staff, Senator Ted Budd (R-NC) (invited)

Jimmy Peacock, Chief of Staff, Senator Eric Schmitt (R-MO)

Moderator: **Brent Robertson**, Chief of Staff, Senator Roger Marshall (R-KS)

Afternoon Session
3:30 PM - 5:00 PM
Crystal Ballroom

A deep dive discussion into the issues and how they are being received at home. Featuring national pollster, Ryan Munce of co/efficient. He will share his findings and showcase the trends amongst Americans. He will not discuss elections or campaign related content but will do a national deep dive into the issues that are important to Americans and how those issues may have changed or will continue to change.

Ryan Munce, co/efficient

Dinner Plenary
7:00 PM - 9:00 PM
Chesapeake Ballroom

The dinner will feature a keynote lecture and conversation with former Secretary of State Mike Pompeo, who will discuss America's role in the world along with the growing threat from China. This session will begin with a 30-minute networking reception, followed by a 90-minute discussion and Q&A with Secretary Pompeo.

The Honorable **Mike Pompeo**, 70th United States Secretary of State

Saturday, April 29, 2023

Breakfast Plenary

9:00 AM - 11:00 AM

Crystal Ballroom

Broken into two separate panel discussions, the group will hear from policy experts from various prominent think-tanks discussing the economy and inflation and a second panel on immigration & border security. Each panel will be broken down into 60-minute segments, giving each panel 45 minutes to introduce and discuss the issue, then will leave 15 or more minutes to take questions from the audience.

Economy/ Inflation

Dr. Michael Strain, Director of Economic Policy Studies & Arthur F. Burns Scholar in Political Economy, American Enterprise Institute

Marc Marie, Regulatory Policy Fellow, Americans for Prosperity

EJ Antoni, Research Fellow, Regional Economics, Center for Data Analysis, The Heritage Foundation

The Honorable **Dr. Michael Faulkender**, Chief Economist, America First Policy Institute & former Assistant Secretary for Economic Policy at the U.S. Department of the Treasury

Moderator: **Allyson Bell**, Chief of Staff, Senator Mike Lee (R-UT)

Immigration & Border Security

Director **Thomas Homan**, former Acting Director of the U.S. Immigration and Customs Enforcement & Visiting Fellow, Border Security and Immigration Center, The Heritage Foundation

The Honorable **Chad Wolf**, former Acting U.S. Secretary of Homeland Security, Executive Director, America First Policy Institute & Chair, Center for Homeland Security & Immigration, America First Policy Institute

Moderator: **Sean Riley**, Chief of Staff, Senator Ron Johnson (R-WI)

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Summit Concludes

2023 Senate Republican Chiefs of Staff & Committee Staff Director's Summit

Invitees

Steve Abbott	Chief of Staff	Senator Susan Collins (R-ME)
Michelle Altman,	Chief of Staff	Senator James Lankford (R-OK)
Geoff Antell	Chief of Staff	Senator John Thune (R-SD)
Clay Armentrout	Chief of Staff	Senator Katie Britt (R-AL)
Allyson Bell	Chief of Staff	Senator Mike Lee (R-UT)
Drew Brandewie	Chief of Staff	Senator John Cornyn (R-TX)
Joel Brubaker	Chief of Staff	Senator Shelley Moore-Capito (R-WV)
Larry Burton	Chief of Staff	Senator Dan Sullivan (R-AK)
Benjamin Cantrell	Chief of Staff	Senator Markwayne Mullin (R-OK)
Craig Carbone	Chief of Staff	Senator Rick Scott (R-FL)
Terry Carmack	Chief of Staff	Senator Mitch McConnell (R-KY)
Steve Chartan	Chief of Staff	Senator Ted Cruz (R-TX)
Kyle Chase	Chief of Staff	Senator Mike Rounds (R-SD)
John Connell	Chief of Staff	Senator Todd Young (R-IN)
Doug Coutts	Chief of Staff	Senator Tom Cotton (R-AR)
Aaron Cummings	Chief of Staff	Senator Chuck Grassley (R-IA)
Blandon David	Staff Director	Committee on Aging
Kolan Davis	Staff Director	Committee on Budget
Doug Davis	Chief of Staff	Senator Cindy Hyde-Smith (R-MS)
Tony Eberhard	Chief of Staff	Senator John Hoeven (R-ND)
Fitz Edler	Staff Director	Committee on Agriculture
Sean Farrell	Chief of Staff	Senator Marsha Blackburn (R-TN)
Kaleb Froehlich	Chief of Staff	Senator Lisa Murkowski (R-AK)
Lisa Goeas	Chief of Staff	Senator Joni Ernst (R-IA)
Brad Grantz	Staff Director	Committee on Commerce
Mark Gruman	Chief of Staff	Senator Kevin Cramer (R-ND)
Mary Blanche Hankey	Chief of Staff	Senator Tommy Tuberville (R-AL)
Jennifer Heins	Chief of Staff	Senator Chuck Grassley (R-IA)
William Henderson	Chief of Staff	Senator Rand Paul (R-KY)
Toni-Marie Higgins	Chief of Staff	Senator John Boozman (R-AR)
Shannon Hines	Staff Director	Committee on Appropriations
Liz Johnson	Chief of Staff	Senator Mitt Romney (R-UT)
Josh Kelley	Chief of Staff	Senator Mike Braun (R-IN)
James Kelly	Chief of Staff	Senator Jerry Moran (R-KS)
Tucker Knott	Chief of Staff	Senator Ted Budd (R-NC)

Dan Kunsman	Chief of Staff	Senator John Barrasso (R-WY)
Emily Leviner	Chief of Staff	Senator Deb Fischer (R-NE)
Amanda Lincoln	Staff Director	Committee on HELP
Neri Martinez	Chief of Staff	Senator Tim Scott (R-SC)
Jessica McBride	Chief of Staff	Senator John Thune (R-SD)
Matt Miltenberger	Chief of Staff	Senator Peter Ricketts (R-NE)
Arjun Mody	Staff Director	Senate Republican Conference Committee
Mike Needham	Chief of Staff	Senator Marco Rubio (R-FL)
Ryan Nelson	Chief of Staff	Senator John Thune (R-SD)
Lila Nieves-Lee	Staff Director	Committee on Banking
Shil Patel	Chief of Staff	Senator Thom Tillis (R-NC)
Jimmy Peacock	Chief of Staff	Senator Eric Schmitt (R-MO)
Richard Perry	Chief of Staff	Senator Lindsey Graham (R-SC)
James Quinn	Chief of Staff	Senator Bill Cassidy (R-LA)
Jacob Reses	Chief of Staff	Senator JD Vance (R-OH)
Gregg Richard	Staff Director	Committee on Finance
Michelle Richardson	Chief of Staff	Senator Roger Wicker (R-MS)
Sean Riley	Chief of Staff	Senator Ron Johnson (R-WI)
Brent Robertson	Chief of Staff	Senator Roger Marshall (R-KS)
Richard Russell	Staff Director	Committee on Energy
Rachelle Schroeder	Staff Director	Committee on Rules and Administration
Chris Socha	Staff Director	Committee on Foreign Relations
Sharon Soderstrom	Chief of Staff	Senator Mitch McConnell (R-KY)
Matt Sommer	Staff Director	Committee on Aging
David Stokes	Chief of Staff	Senator John Kennedy (R-LA)
Adam Telle	Chief of Staff	Senator Bill Hagerty (R-TN)
Darin Thacker	Chief of Staff	Senator Steve Daines (R-MT)
Adam Tomlinson	Staff Director	Committee on Environment
Jon Towers	Staff Director	Committee on Veterans Affairs
Kristin Walker	Chief of Staff	Senator Cynthia Lummis (R-WY)
Brian Walsh	Staff Director	Committee on Intelligence
John Wason	Staff Director	Committee on Armed Services
Chris Weihs	Chief of Staff	Senator Josh Hawley (R-MO)
Meredith West	Staff Director	Small Business & Entrepreneurship Comm.
Susan Wheeler	Chief of Staff	Senator Mike Crapo (R-ID)
Ryan White	Chief of Staff	Senator James Risch (R-ID)
Kristi Williams	Staff Director	Committee on Indian Affairs